



**San Bernardino County
Employees' Retirement Association
(SBCERA)**

348 West Hospitality Lane
San Bernardino, CA 92415-0014



Dates of Engagement
2001 – 2005

Purpose / Objectives

- Development of functional requirements for a new automated public employee retirement system
- Development of an RFP for a new retirement system
- Development of recommendations for business process improvements
- Oversight project management and quality assurance assistance during the implementation effort

Nature of LRWL Services

LRWL assisted SBCERA in achieving its objective of redesigning its manual- and paper-centric processes using technology-based business enablers such as workflow, bar coding, imaging, automated retirement payroll, and retirement database integration as well as the implementation of an industry standard accounting package. The project entailed industry standard "business analysis" activities, methods, and procedures.

The project's primary activities were development of an RFP for an integrated Retirement System Application with a General Ledger module and Imaging interface, then Project Oversight including the development of recommendations for process and automated workflow that will enable and automate many current manual and paper intensive processes.

LRWL's responsibilities included:

- Oversight project management and quality assurance of the entire implementation effort
- Assisting the client in defining its current processes, procedures, and capabilities, including any shortcomings in the current environment
- Assisting the client in identifying and implementing fast-payback business process and/or organizational improvements; efficiencies thus gained early in the project make it easier for the client to support the demands of the rest of the project
- Assisting the client in defining improvements and new functionality to be provided by the new integrated system
- Developing an RFP for the new integrated system and conducting a competitive procurement
- Developing selection criteria and an evaluation methodology (including a scoring package) to guide the objective evaluation of proposals received in response to the RFP
- Assisting in the evaluation of the proposals
- Participating in contract negotiations to obtain the best value for SBCERA.
- Providing oversight project management and quality assurance assistance during the implementation, including effective monitoring of the change order process

The project concluded under budget and with full functionality delivered.